

# Human Resource Management System

## Workday Job Aid Manage Hire Process



This Job Aid describes the information People Managers can view about their workers in the organization.

- ☐ Employees
- ☒ People Managers
- ☐ Human Resources

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### 1. Overview – The Hire Process Lifecycle

For the majority of the County workforce, the **Position Management** staffing model is used. What this tells us is that to hire a person for a given job, a position must exist for that job in Workday.

A new position starts with a manager identifying a need for additional headcount for their area and including that need in the annual budget for their department. If that position is included in the approved budget and it is not already defined in Workday, a budget office administrator will create the position. If the position already exists, then it will need to be unfrozen so that it can be hired against.

The next step in the process is to ensure that the appropriate budget funding has been assigned to the position (if not already there) so that it can be approved. Once the position has been approved, a requisition is created for that position. At this point, the recruitment team works to fill the position.

The person hired for the position could eventually be promoted out of that position, leave the company, or retire. At the point the position becomes vacant it is not closed, but rather set to a frozen state in Workday. If the position is to be filled again it needs to be unfrozen. This is a County rule that requires budget approval each time someone is hired into a position, even if that position previously existed.



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### 2. Revise Employee Hire

After an employee is hired, a review of their record in Workday may identify a correction that is needed. The following steps are to be performed by an HR Partner to make corrections to an Employee's hire record:

- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on **Job** on the left side of the screen.
- Click on the **Worker History** tab.
- Scroll down and find the **Hire** event under the **Business Process** column.
- Click on the **Hire** event link.

**Note:** The next page displayed will list the title: **View Event**.

- Click on the **Actions** Button, hover over **Business Processes**, and then click on the **Correct** menu item.
- Fill in the appropriate fields (\* indicates a required field).

**Note:** You must enter a comment explaining the reason for the correction.

- Click **Submit**.
- Click **Done**.

**Note:** Special care needs to be taken when adjusting historical records in Workday. Often it is best to make an adjusting transaction (especially with compensation), as opposed to modifying history.



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### 3. Change Organization Assignment

The Change Organization Assignment business process is used when the default funding assignment for the employee's job is changing.

The following steps are to be performed by an HR Partner to process the Change Organization Assignment task:

- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on the **Actions** Button, hover over **Organization**, and then click on the **Change Organization Assignments** menu item.
- Enter the **Effective Date** of the assignment.

Note: If the employee has multiple jobs, select the job to which the change applies.

- Click **OK**.
- Fill in the appropriate fields (\* indicates a required field).
- Click **Submit**.
- Click **Done**.



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### 4. Propose Compensation

The Propose Compensation task is a subprocess within the Hire process. Compensation is typically generated at the time the position is created. If there is a need for compensation on a position to change, the following task can be performed.

Here are the steps to perform to propose a compensation change for a position tied to a specific employee:

- In the Workday Search bar enter "req com cha".
- Click on the **Request Compensation Change** task in the results returned.
- Enter the **Effective Date** of the change.
- Select the **Employee** from the list provided.
- Click **OK**.
- Fill in the appropriate fields (\* indicates a required field).
- Click **Submit**.
- Click **Done**.

**Note:** This request needs to be approved by the Compensation Partner, followed by Labor Relations and Civil Service.



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### 5. Assign CBA (Coll. Barg. Ag.)

The CBA assignment is typically performed during the **Hire** process. If changes need to be made after that point the **Assign Collective Agreement** task is used.

Here are the steps to Assign a CBA to an employee:

- In the Workday Search bar enter "ass col agr".
- Click on the **Assign Collective Agreement** task in the results returned.
- Update the **Effective Date** if it differs from the date already filled in.
- Select the **Employee** from the list provided.
- Click **OK**.
- Select the **Collective Agreement** to be assigned to the selected employee.
- Click **Submit**.
- Click **Done**.



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### 6. Complete I-9

Use Form I-9 to verify the identity and employment authorization of individuals hired for employment in the United States. All U.S. employers must properly complete Form I-9 for each individual they hire for employment in the United States. This includes citizens and noncitizens. This is typically done during the Onboarding process but can also be run as a stand-alone process.

Here are the steps involved in completing this process:

- In the Workday Search bar enter "com i-9".
- Click on the **Complete Form I-9** task in the results returned.

**Note:** The first page should display the employee's name in the worker field.

- Click **OK**.
- Fill in the appropriate fields (\* indicates a required field).
- Click **Submit**.
- Click **Done**.

**Note:** This request is sent to the HR Partner for review and approval.



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### 7. Assign Pay Groups

The steps involved to Assign a Pay Group to an employee are documented in the **Staffing** job aid ([SC-CM-TRN-034 Job Aid – Staffing](#)). Please review that document for further details.





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### 8. Complete Benefits Enrollment

As part of the New Hire business process, the employee is to complete their initial benefit elections. They will receive a "New Hire" task in their Workday Inbox that they are to complete within their first 30 days of employment. If no action is taken by the employee, the Workday system, by default, will enroll the employee in the health benefits.

**Note:** If the employee plans to cover dependents with their benefits they will need to add those dependents to Workday first before they assign coverage to them.

**Note:** The Benefits Job Aid ([SC-CM-TRN-026 Job Aid – Benefits](#)) contains detailed instructions on how to both manage dependents as well as enroll them in the benefits offered by the County.



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### 9. Add Probation Period

There are times when a new hire is assigned a probationary period. This assignment is entered and managed within Workday. The following steps outline how to assign this to a new hire.

Here are the steps involved in completing this process:

- In the Workday Search bar enter "add pro per".
- Click on the **Add Probation Period** task in the results returned.  
**Note:** This will also show up as an optional task in the Hire Business Process.
- Select the employee you are looking to add the probationary period to.
- Click **OK**.
- Fill in the appropriate fields (\* indicates a required field).
- Click **Submit**.

**Note:** Once the Roster Info is saved the HR Partner needs to navigate back to the To-Do item and click **Submit** to signify that it was completed.



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### 10. Add Roster Info

During the Hire Business process for all Regular or Temporary Employees, a required To-Do will be raised to the HR Partner. This To-Do will state that the Employee's Roster History needs to be updated.

Here are the steps involved in completing this process:

- In the Workday Search bar, the HR Partner enters the employee's (new hire) name.
- In the results returned click on the employee's name. This will take you to the employee's profile.
- Click on the Actions button and scroll down the menu to the **Additional Data** item.
- Hover over the Additional Data menu item and then click on the **Edit** menu item to the right.

**Note:** You will be presented with the **Edit Additional Data** screen.

- Select **Roster History** in the **Custom Object** list provided.
- Click **OK**.

**Note:** You will now be presented with the Edit Roster History screen to add a data entry row.

- Fill in the appropriate fields (\* indicates a required field).
- Click **OK**.
- Click **Done**.

**Note:** At this point, the HR Partner needs to navigate back to the To-Do item and click **Submit** to signify that it was completed.



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### 11. Assign Work Schedules

As part of the New Hire business process, as well as the Change Job process, the HR partner will assign the employee a work schedule. This will define the number of hours the employee works in a week as well as the specific hours they work each day. The work schedule will also define their lunch break, and whether any portion of their workweek is considered flex-time. During these processes, the Assign Work Schedule task will be presented as a To-Do.

**Note:** This task can also be accessed by using the search bar and entering “assi wor sch”. If accessing the task in this manner the employee’s name will have to be entered on the initial screen. If accessed via the New Hire or Change Job processes the employee name will be prefilled.

Here are the steps involved once the Assign Work Schedule screen is displayed.

- If not already filled in select the **Worker** you are assigning a work schedule to.
- Enter the **Start Date** of when the schedule will take effect.

**Note:** If this assignment is temporary an **End Date** can also be entered.

- Select the appropriate **Work Schedule Calendar** for the employee.
- Click OK.



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### 12. View Remaining Tasks of a Business Process for a Pre-Hire

During the hiring process there are several Business Processes that are executed involving the new employee (Pre Hire) in question. While still in the "Pre-Hire" phase the only means to access the new employee's Workday record is by accessing it via the staffing tab of the Supervisory Organization the new employee is being hired into.

For those business processes that are not already complete several important pieces of information may need to be understood by the Payroll Rep. Those pieces of information would include; what tasks have been completed, what tasks still remain, and who is responsible for completing the task that is currently in process. This will allow for proper follow up and accurate status updates.

The steps required to view the current state of a business process for a Pre-Hire are as follows:

1. In the Search bar enter the name of the Supervisory Org the New employee is joining.
2. Click on the Supervisory Org from the list of returned results.  
**Note:** This will take you to the Supervisory Orgs Profile page.
3. Click on the **Staffing** menu item.
4. Scroll down to the section that is titled **In Progress Staffing Actions**.
5. Continue to scroll until you find the row with the new employee's name listed on it.
6. Click on the business process listed to the left of the employee's name in order to view the details.
7. On the next page click on the **Process** tab.
8. This will provide a list of the tasks that make up the selected business process.
9. Scroll through the list toward the bottom, paying careful attention to each row's value in the **Status** column.

**Note:** If the Business Process has not been completed the last task in the list will be listed with a status of "Awaiting Action". In the **Person** column for that task you will find the name of the person(s) who are responsible for completing the task.

**Note:** If there are more tasks beyond that one, you will find a **Remaining Process** button at the bottom of the page. Clicking on that button will display the remaining tasks to be performed along with the person(s) responsible for completing each task.

10. Once you have completed your review of the remaining tasks click on the Workday symbol at the top left of the page to return to the Homepage.



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